



Job Aid:

How to Clone a Bid

This Job Aid shows how to:

- Clone a Bid in COMMBUYS
- Edit and create a “Sent” Bid

Of Special Note:

Bids (solicitations) are published documents that request price quotes on goods and services from potential vendors. Cloning will allow you to copy (or clone) a previously created bid in order to create a new bid, thus eliminating the need to re-enter the majority of the data. This job aid focuses on cloning a bid created in COMMBUYS.

Keep in mind: When cloning a Bid in COMMBUYS, you may need to do the following:

- All documents required should be added to the bid using the Attachments tab in COMMBUYS.

Remember to review all attachments and make changes, specifically to all time sensitive information. The new bid will have new document number and allow you to edit data in any way you need to in order to update the bid information.

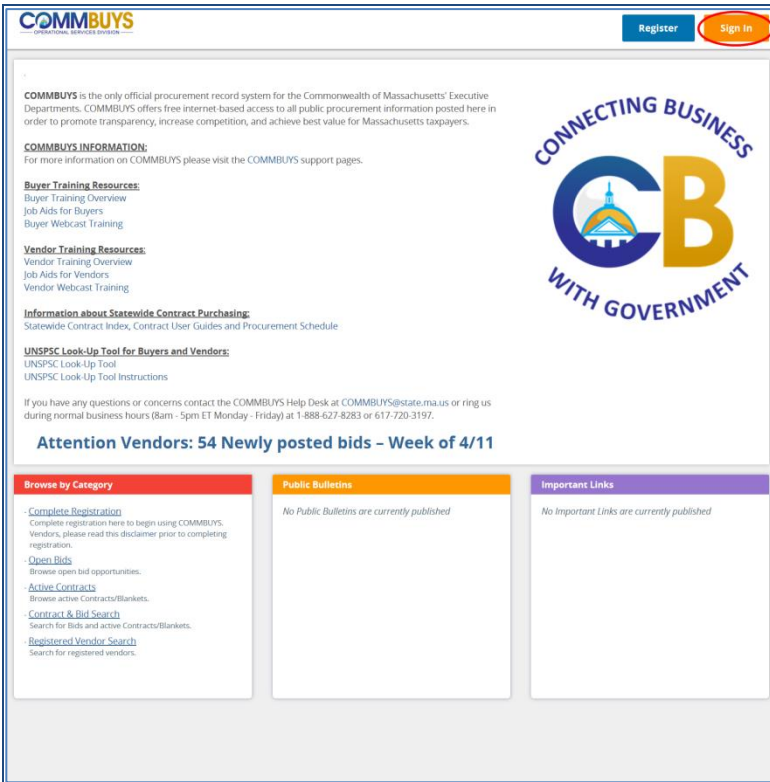
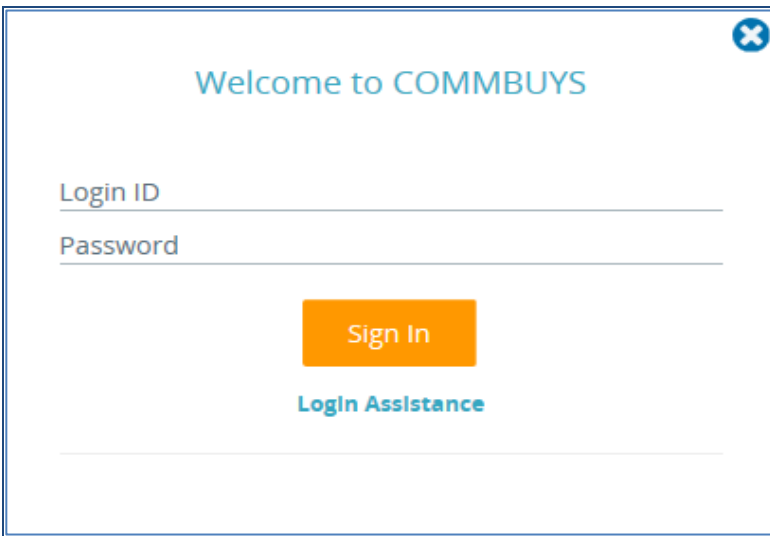
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Step

Action

Step 1: Accessing the COMMBUYS Landing Page

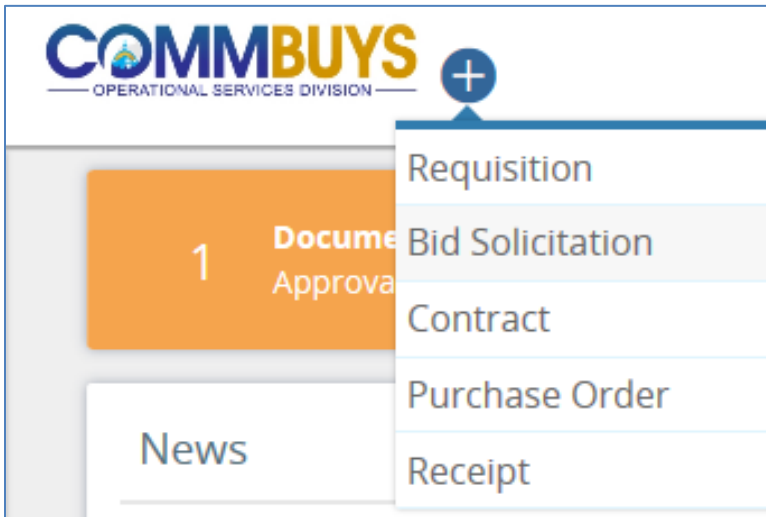
1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click on the **Sign In** button.

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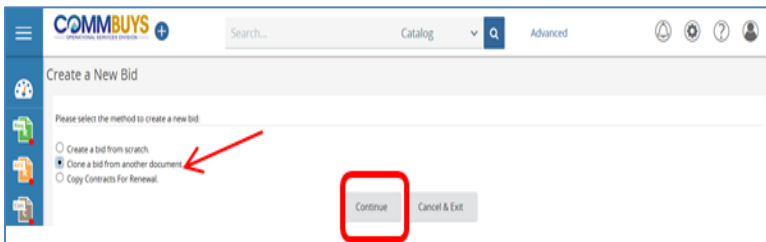
Step 2: Creating a New Bid

1. Click on the **Add Documents** (plus sign) icon.
2. Select **Bid Solicitation** from the dropdown menu.



Step 3: Cloning a New Bid From Another Document

1. Click on the radio button next to **Clone a bid from another document**.
2. Click on the **Continue** button.



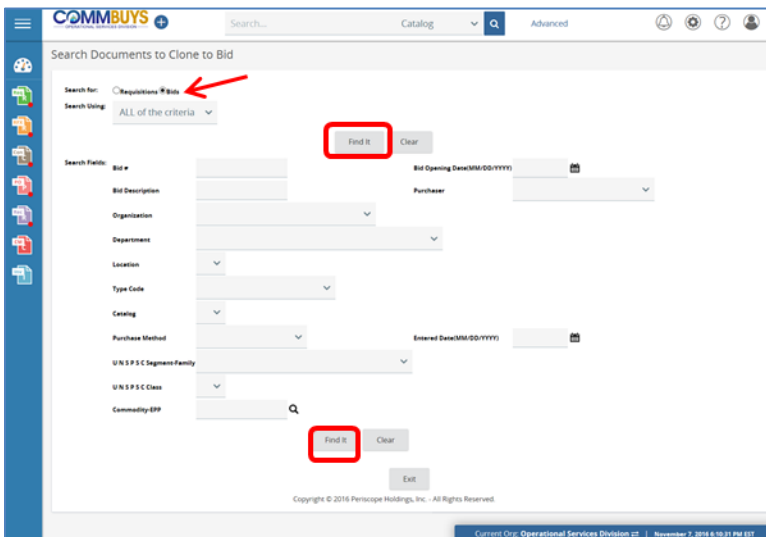
Step 4: Finding the Bid

1. The Search screen displays. Next to the Search for: field, click on the radio button for **Bids**.
2. Enter the search criteria for the bid that you wish to clone.

Some Search Options include:

- **Bid #:** COMMBUYS bid number
- **Bid Description:** department number schema
- **Purchaser**
- **Organization**
- **Department**

3. Click on the **Find It** button.



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Step 5: Selecting the Bid to Clone

1. The Search Results page appears with a list of bids created in COMMBUYS. Click on the **radio button** next to the Bid you wish to clone.
2. Click on the **Clone Bid & Exit** button.

If you want to add items to the cloned bid, click on the **Clone Bid & Add More Items** button.

Another way to clone a bid is to open the bid you wish to clone. From the **Summary** tab, scroll to the bottom of the page and click on the **Clone Bid** button. To find your bid, you click on the orange **Bid Solicitation** button in the left column of the home page. Click on the status of the bid you are trying to locate. You could also click on the Advanced link at the top of the page to locate your bid using multiple search options.

Step 6: Completing the New Bid General Tab

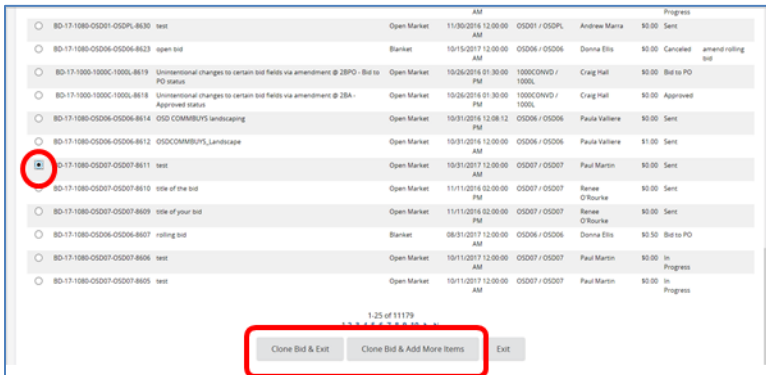
A new bid is created and opens to the **General** tab where important information about the bid is entered such as setting the bid dates and bid type.

NOTE: Red Validation errors display upon initial creation of the bid. These will resolve after entry of all required information.

Mandatory fields for the cloned bid:

- **Department:** select from the department from dropdown, if not automatically populated
- **Location:** select the location dropdown; if not automatically populated
- **Available Date:** date the bid will be viewable on COMMBUYS
- **Purchase Method:** select from the dropdown

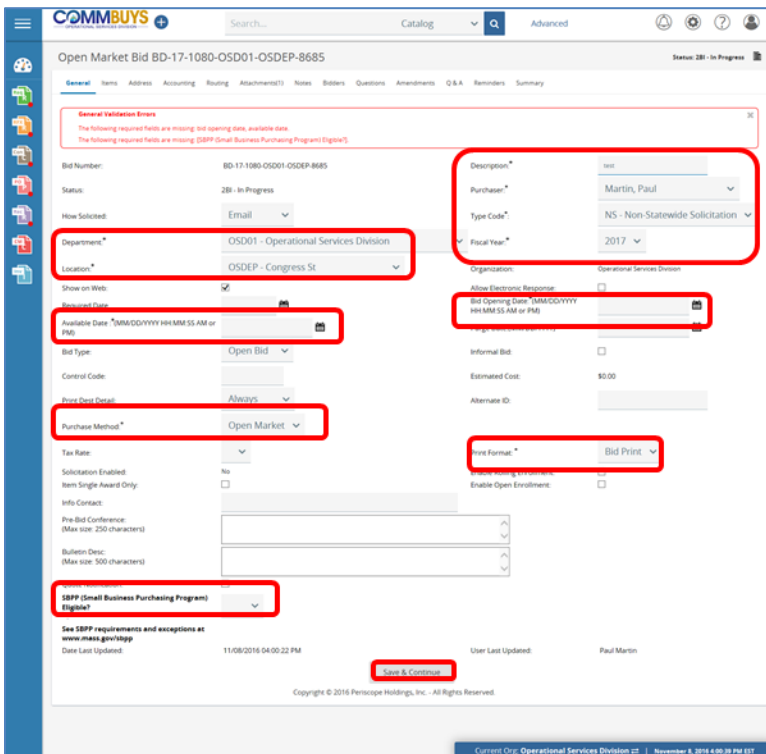
- **Open Market** – one time bid
- **Contract** – do not use
- **Blanket** – results in a contract (departmental or statewide)



Bid Number	Description	Status	Created Date	Created By	Progress
BD-17-1080-OSD01-OSDPL-8630	test	Open Market	11/30/2016 12:00:00 AM	OSD01 / OSDPL	Andrew Maria \$0.00 Sent
BD-17-1080-OSD06-OSD06-8623	open bid	Blanket	10/15/2017 12:00:00 AM	OSD06 / OSD06	Donna Ellis \$0.00 Cancelled amend rolling bid
BD-17-1080-1000C-1000C-8619	Unconditional changes to certain bid fields via amendment @ ZBPO - Bid to PO status	Open Market	10/26/2016 01:30:00 PM	1000C/CONVD / 1000C	Craig Hall \$0.00 Bid to PO
BD-17-1080-1000C-1000C-8618	Unconditional changes to certain bid fields via amendment @ ZBA - Approved status	Open Market	10/26/2016 01:30:00 PM	1000C/CONVD / 1000C	Craig Hall \$0.00 Approved
BD-17-1080-OSD06-OSD06-8614	OSD COMMBUYS Landscaping	Open Market	10/31/2016 12:08:12 PM	OSD06 / OSD06	Paula Valente \$0.00 Sent
BD-17-1080-OSD06-OSD06-8612	OSD COMMBUYS Landscaping	Open Market	10/31/2016 12:00:00 AM	OSD06 / OSD06	Paula Valente \$1.00 Sent
BD-17-1080-OSD07-OSD07-8611	test	Open Market	10/31/2017 12:00:00 AM	OSD07 / OSD07	Paul Martin \$0.00 Sent
BD-17-1080-OSD07-OSD07-8610	title of the bid	Open Market	11/11/2016 02:00:00 PM	OSD07 / OSD07	Renee O'Rourke \$0.00 Sent
BD-17-1080-OSD07-OSD07-8609	title of your bid	Open Market	11/11/2016 02:00:00 PM	OSD07 / OSD07	Renee O'Rourke \$0.00 Sent
BD-17-1080-OSD06-OSD06-8607	rolling bid	Blanket	08/31/2017 12:00:00 AM	OSD06 / OSD06	Donna Ellis \$0.50 Bid to PO
BD-17-1080-OSD07-OSD07-8606	test	Open Market	10/11/2017 12:00:00 AM	OSD07 / OSD07	Paul Martin \$0.00 In Progress
BD-17-1080-OSD07-OSD07-8605	test	Open Market	10/11/2017 12:00:00 AM	OSD07 / OSD07	Paul Martin \$0.00 In Progress

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Clone Bid & Exit Clone Bid & Add More Items Exit



Open Market Bid BD-17-1080-OSD01-OSDEP-8685

Status: 2B1 - In Progress

General Validation Errors
The following required fields are missing: bid opening date, available date
The following required fields are missing: SBPP (Small Business Purchasing Program) Eligible?

Bid Number: BD-17-1080-OSD01-OSDEP-8685

Status: 2B1 - In Progress

How Solicited: Email

Department: OSD01 - Operational Services Division

Location: OSDEP - Congress St

Available Date: 11/08/2016 04:00:22 PM

Bid Type: Open Bid

Purchase Method: Open Market

Bid Opening Date: 11/08/2016 04:00:22 PM

SBPP (Small Business Purchasing Program) Eligible?

Save & Continue

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- **SBPP (Small Business Purchasing Program) Eligible?**
- **Description:** is a searchable field; enter short bid description (option to use your agency's Bid numbering schema)
- **Purchaser:** defaults to designated purchaser
- **Type Code:** dropdown; only use the two options below
 - **SS** – Statewide Solicitation (only authorized SW contracts)
 - **NS** – Non-Statewide Solicitation
- **Fiscal Year:** will auto populate but can be changed
- **Bid Opening Date:** use the calendar icon to select the scheduled date to open the bid for review and award, which closes the bid to vendors. COMMBUYS will no longer accept quotes for that Bid and the Buyer is able to open and view quotes
- **Print Format:** one option; ignore

Mandatory fields for a Blanket (contract):

- **Purchase Method:** dropdown; if Blanket is selected, two additional fields requiring input populate
- **Blanket Begin Date:** beginning date of the blanket, use the calendar icon to select date
- **Blanket End Dates:** blanket end date, use the calendar icon to select date

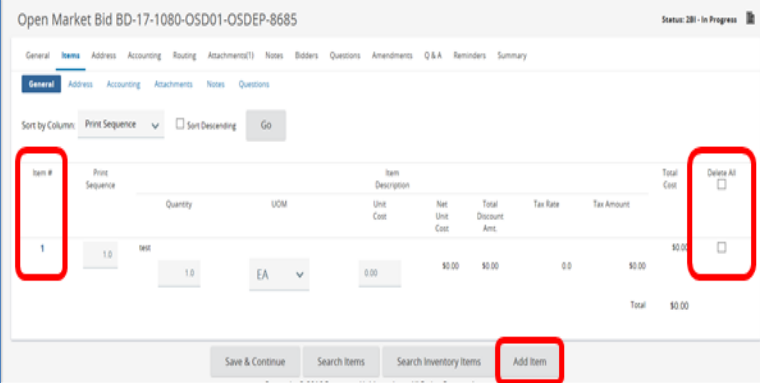
When data entry is complete, click on the **Save & Continue** button.

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Step 7: Completing the Items Tab

1. Click on the **Items** tab. The Items tab opens.
2. If you would like to view the existing items, click on the blue hyperlink for the item in the Item # column.
3. Delete the item(s) if they do not apply to this new cloned bid by clicking the check box next to the item, or to delete all, click the top Delete All box.
4. Click on the **Save & Continue** button.
5. To add an item, click on the **Add Item** button.

You will want to ensure that all information applies to this new bid and is verified prior to sending the bid to the vendor.



Open Market Bid BD-17-1080-OSD01-OSDEP-8685 Status: 281 - In Progress

General **Items** Address Accounting Routing Attachments(?) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Print Sequence	Quantity	UOM	Item Description	Unit Cost	Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1	1.0	1.0	EA		0.00	\$0.00	\$0.00	0.0	\$0.00	\$0.00
Total										\$0.00

Delete All ☐

Save & Continue Search Items Search Inventory Items **Add Item**



OPERATIONAL SERVICES DIVISION

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Step 8: Adding Items

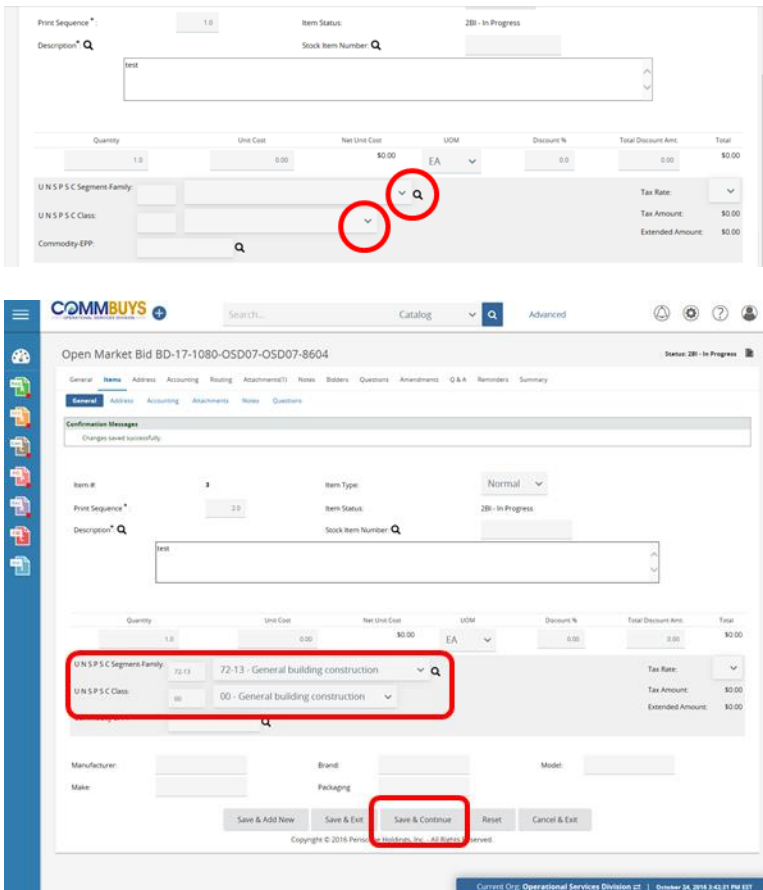
1. The Items tab page opens to allow you to add an Item or narrative item to the bid. The following required fields must be completed for an open market item:

- **Item #:** Automatically issued by COMMBUYS.
- **Item Type:** Select one of two options in the dropdown menu:
 - Normal, the default value,
 - Narrative, which permits the addition of a non-item to allow an additional description to appear on the bid.
- **Print Sequence #:** Change this auto-filled field if the order of the bid line items should print in a different order from the Item number order.
- **Description*:** Enter a description of the product or service up to 1000 characters.
- **Quantity:** Enter the quantity if known or enter 1 if unknown.
- **Unit Cost:** Enter the cost of the product or service per 'unit' of quantity. Enter 1.00 or leave blank if unknown.
- **UOM:** Select the unit of measure (UOM) - how the item is sold, packaged, or purchased - from the dropdown menu.
- **UNSPSC:** Each product or service is required to have a corresponding United Nations Standard Products and Services Code (UNSPSC).

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Step 9: Adding UNSPSC Codes

1. Click on the dropdown arrow next to the **UNSPSC Segment-Family** field.
2. Click on the desired UNSPSC Segment-Family code.
3. The screen refreshes with the cursor in the **UNSPSC Class** field. Click on the dropdown arrow next to the UNSPSC Class field and the Class results display.
4. Click on the desired UNSPSC Class code.
5. Scroll to the bottom of the screen and click on the **Save & Continue** button.



Print Sequence: 1.0 Item Status: 28B - In Progress

Description:

Stock Item Number:

Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt	Total
1.0	0.00	\$0.00	EA	0.0	0.00	\$0.00

UNSPSC Segment-Family:

UNSPSC Class:

Commodity-EPP:

Tax Rate:

Tax Amount: \$0.00

Extended Amount: \$0.00

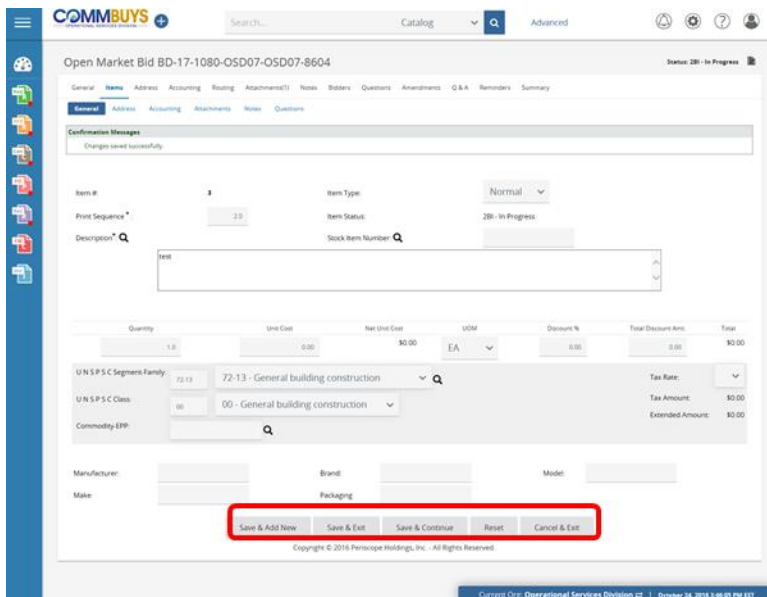
Manufacturer: Brand: Model:

Make: Packaging:

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Current Org: Operational Services Division US | December 3A 2016 3:42:31 PM EST

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Step 10: Saving the Items

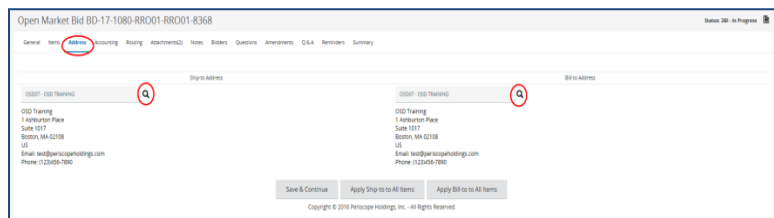
- After each item is added to the bid, scroll to the bottom of the page to click on the best option. there are five button options:
 - Save & Add New** – This button saves the item to the bid and opens a new item entry so that additional items can be added.
 - Save & Exit** – This button saves the item, closes the item entry page, and returns to the Items tab (general sub tab).
 - Save & Continue** – This button saves the item and remains on the item entry page.
 - Reset** – This button removes the item from the bid without saving it.
 - Cancel & Exit** – This button cancels the item and exits from the item entry page.

Repeat Steps 7 through 9 until the item entry is complete then click the **Save & Exit** button.

Step 11: Reviewing Addresses

- Click on the top level **Address** tab.
- The Address page should prefill. Update the Address page by clicking on the magnifying glass if items are being shipped to, or billed to a different address than the default.
- If no change is required go to Step 12.
- If there is an error message indicating that no valid ship-to address exists, click on the magnifying glass icon to select a Ship-to address.

NOTE: If you want the option to ship to multiple addresses, go back to the Items tab and select the Address sub tab.



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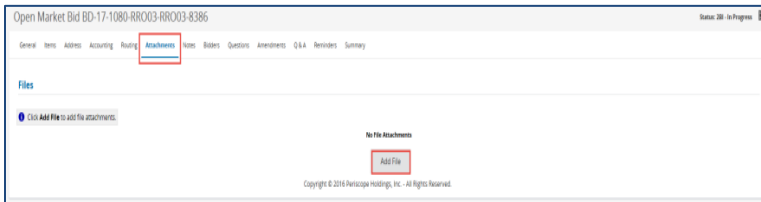
Step 12: Adding Attachments

NOTE: The Accounting tab is not currently used in COMMBUYS. The Routing tab is not activated until after you submit it for approval.

1. Click the **Attachments** tab. If any files auto-attach, review, keep, or delete as necessary. Attachments can include bid attachments and required forms and contract documents
2. Click the **Add File** button to add a new file.

Step 13: Browsing and Selecting a File

1. When the Add File window opens, click the **Browse** button. This will search for documents from your computer.
2. Click on the desired file from the popup window and click on the **Open** button to add.
3. Complete the following fields:
 - **Name** – required; but will be populated with the selected file name if left blank.
 - **Description** – optional.
4. Click on the **Save & Continue** button to add another file, or click on the **Save & Exit** button when all files have been added.



Open Market Bid BD-17-1080-RR003-RR003-8386

General Items Address Accounting Routing **Attachments** Notes Bidders Questions Amendments Q & A Revisions Summary


Files

Click Add File to add file attachments.

No File Attachments

Add File

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Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*

Description

File*

Browse

Search File

Location

1080

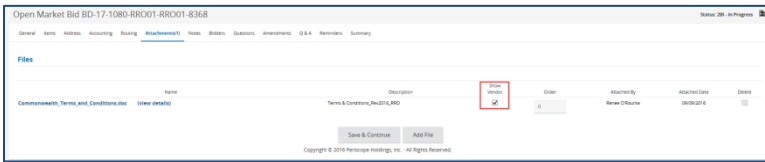
Save & Exit Save & Continue Reset Cancel & Exit

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Step 14: Showing the Vendor

After saving an attachment, the **Show Vendor** checkbox displays with a checkmark. If you do not wish the vendor to see this particular document, uncheck the Show Vendor checkbox. Follow OSD and department policy when unchecking this box.



Step 15: Adding Notes

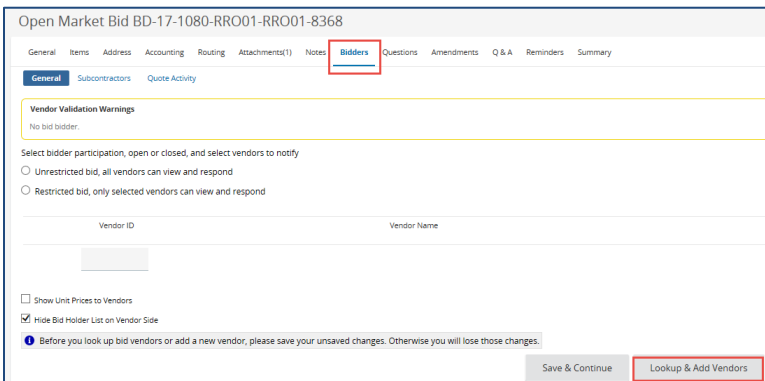
1. Click on the **Notes** tab if you would like to add a note in the Note box. Notes are viewable only by Commonwealth users. Vendors cannot access or view these notes.
2. When complete, click on the **Save & Continue** button.



Step 16: Adding Vendors

If you did not make any changes to the items tab, the vendors who were notified on your original bid are shown. Since new vendors register every day, it would be a wise to look up and add vendors again that match your item/service you are trying to purchase.

1. Click the **Bidders** tab.
2. When the Bidders screen opens, click on the **Lookup & Add Vendors** button at the bottom of the page.



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Step 17: Searching for Vendors

1. When the popup window appears enter the vendor search criteria.
2. Click the **Find It** button.
3. Alternatively, scroll to the bottom of the page and click **Find Vendors for All Commodity-EPP on the Bid** button.

COMMBUYS automatically matches the vendors who have registered with the associated UNSPSC codes. These vendors will receive an email notification of the bid.

4. Select the desired vendor(s) from the search results by clicking on the checkbox next to the vendor name, or click on the top Select checkbox to select all vendors on the list.
5. A popup window displays with a warning message when selecting all vendors. Click **OK**. The popup window will disappear.
6. Scroll to the bottom of the page and click the **Save & Exit** button to return to the Bidders tab.

Lookup & Add Reference Vendors - Bid BD-17-1080-RR001-RR001-8368

Vendor Lookup

Search Using: ALL OF THE CRITERIA

Search Fields:

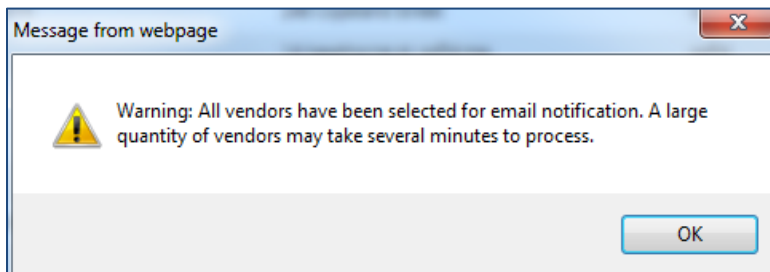
Vendor ID	Vendor Name
Vendor Tax ID	Vendor Legal Name
Vendor Keyword	Alternate ID
EPP Code	County
Date	
<input type="checkbox"/> Emergency Supplier <input type="checkbox"/> Reference Vendor	
UNSPSC Segment Family	
UNSPSC Class	
UNSPSC Segment	
Disadvantaged Business Enterprise	Not Certified
VOSB Category	Not Certified
VOSB Number	This is the DUNS number assigned to my Business
Internationally Productive Product	Not Certified
Lebanon, Iraq, Kuwait and Transgender-Owned Business Enterprise	Not Certified
Minority-Owned Business Enterprise	Not Certified
Portuguese-Owned Business Enterprise	Not Certified
Prompt Pay Discount	Not Certified
Are you interested in partnering as a Prime/Sub-contractor?	Not Certified
Geographical Service Area in Massachusetts	Western Massachusetts
Service Disabled Veteran-Owned Business	Not Certified
Women-Owned Business Enterprise	Not Certified
Business Structure	Sole Proprietor
ASSISTANT AND TENDERS OF THE BILLS	Yes
Business Type	Business Enterprise (for profit)
Veteran-Owned Business Enterprise	Not Certified
Women Non-profit Organization (WNP)	Not Certified

Browser: ☐ Small Business Purchasing Program

Find It Clear

Find Vendors for All Commodity EPPs on the Bid Close Window

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Step 18: Adding and Deleting Vendors

The **Bidders** tab now displays all the Vendors you selected.

1. You can delete vendors using the checkboxes in the left **Delete** column or delete all vendors by selecting the top **Delete All** checkbox at the top of the column.

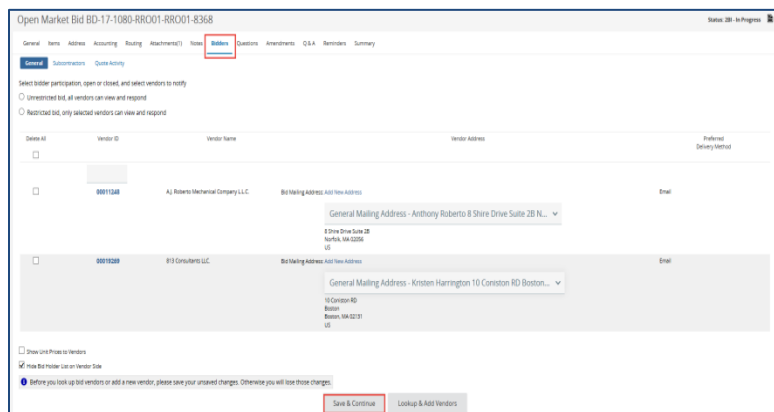
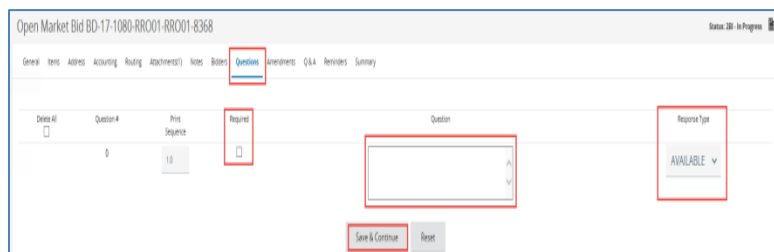
NOTE: Deleting vendors means that the bid is no longer unrestricted. Refer to OSD and your department policy for guidance.

2. You can continue to add Vendors by clicking the **Lookup & Add Vendors** button.
3. When you are done, click the **Save & Continue** button.

NOTE: If the bid is restricted, click on the **Restricted bid, only selected vendors can view and respond** radio button. Refer to OSD and your department policy for all restricted bids. This step needs to be done after you select your vendors. If done prior, it will de-select and not be saved.

Step 19: Entering Questions

1. Click on the **Questions** tab.
2. You can ask vendors questions by entering text in the **Question** field.
3. Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.
4. Select a value from the **Response Type** dropdown menu to establish a format for the vendor response.
5. Click on the **Save & Continue** button to save your entries.

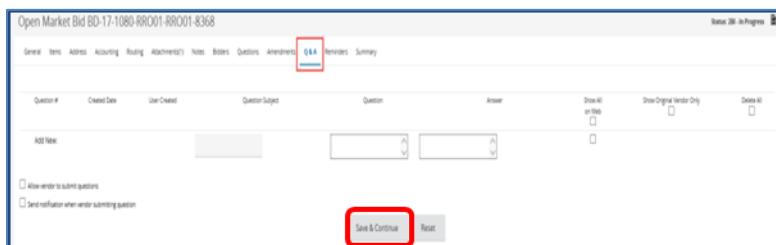



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Step 20: Opening Q&A Dialogue

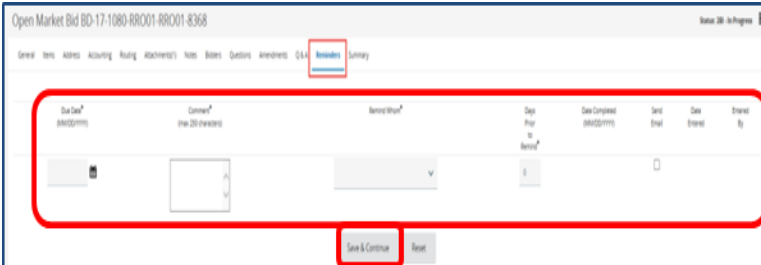
NOTE: The Amendments tab is not activated until after the bid is sent.

1. Click on the **Q&A** tab.
2. To allow dialogue with vendors, select the **Allow vendor to submit questions** checkbox.
3. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.
4. If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.
5. If you wish to display the dialogue on the Web, select the **Show All on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate – refer to OSD and department policy.
6. Click on the **Save & Continue** button.



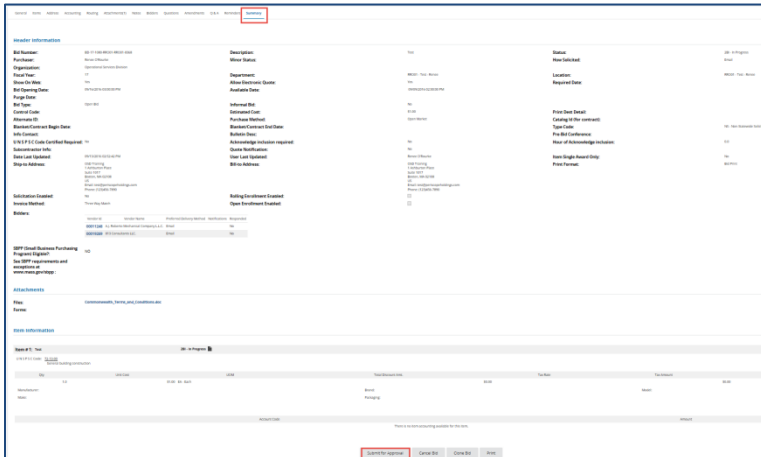
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Step 21: Entering Reminders



1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization.
2. Use the calendar icon in the **Due Date** field to select the date of the reminder, then enter your reminder text in the **Comment** field.
3. Select yourself or another internal recipient in the drop-down menu next to the **Remind Whom** field.
4. If an advanced reminder is desired enter a number in the **Days Prior to Remind** field.
5. If you would like to receive an email when your reminder is due, select the **Send Email** checkbox.
6. When complete, click on the **Save & Continue** button.

Step 22: Reviewing the Bid



1. Click on the **Summary** tab to review all of the entered data.
2. When finished, scroll to the bottom of the page and click on the **Submit for Approval** button.

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Step 23: Approval Path

1. An approval path will display, or you're given the option to select an appropriate one. Click on the **Save & Continue** button to complete.

NOTE: The bid will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS and continue with Step 24.

Step 24: Sending the Bid to the Vendor

1. Once approved, locate the bid.
2. Select either the **Change bid status to "Sent" and notify vendors** radio button or the **Change bid status to "Sent" only** radio button.
3. Click on the **Send Bid** button.

The bid is now posted on **COMMBUYS**. Vendors may be able to respond depending on the available date set on the General tab.

